North Carolina COVID-19 Vaccine Management System (CVMS)

Provider Portal

Log In and Getting Started User Guide
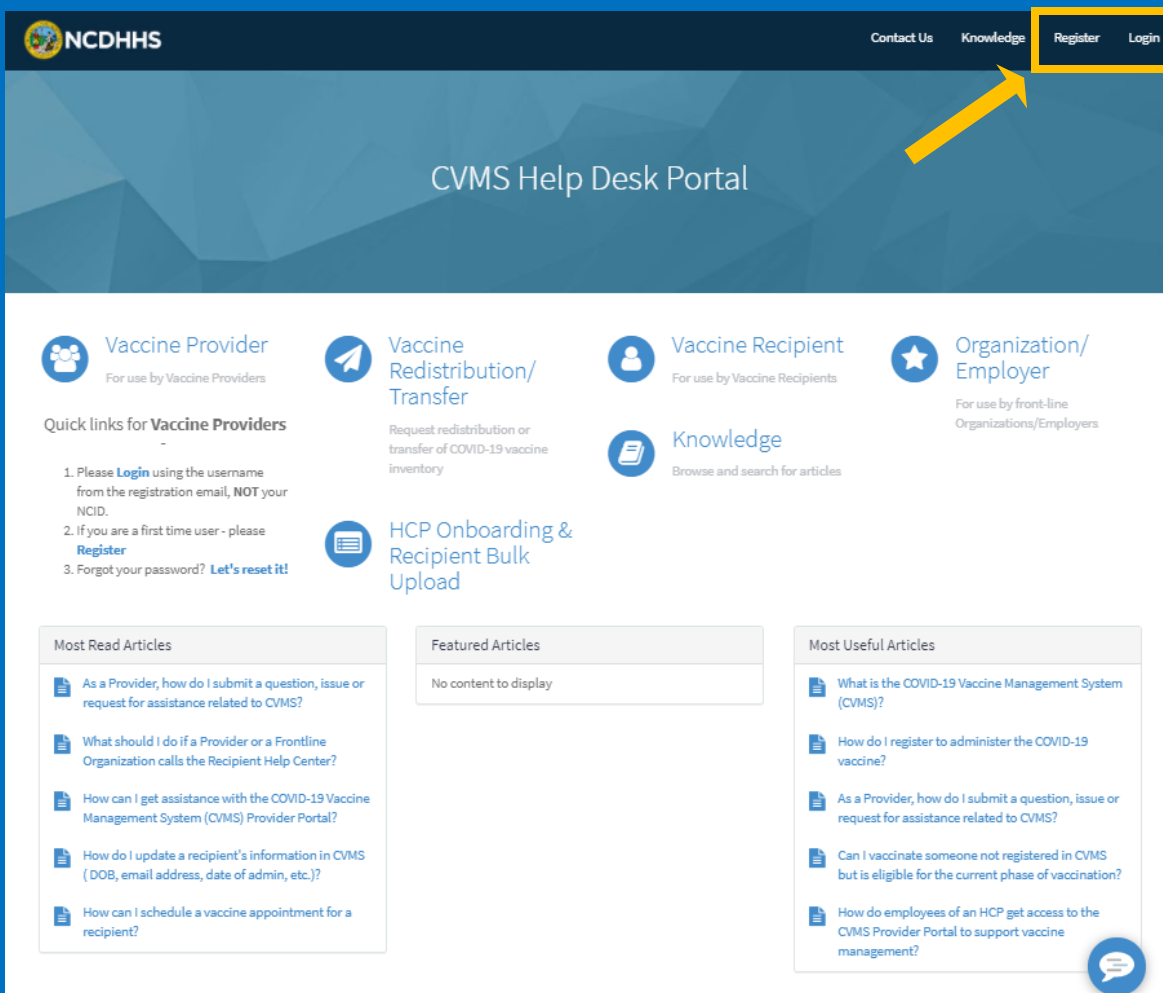
Version 9

June 28, 2021

NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**

CVMS Help Desk Portal

Contact Us   Knowledge   Register   Login

Vaccine Provider
For use by Vaccine Providers

Vaccine Redistribution/ Transfer
Request redistribution or transfer of COVID-19 vaccine inventory

Vaccine Recipient
For use by Vaccine Recipients

Organization/ Employer
For use by front-line Organizations/Employers

Quick links for **Vaccine Providers**
-
1. Please **Login** using the username from the registration email, **NOT** your NCID.
2. If you are a first time user - please **Register**
3. Forgot your password? **Let's reset it!**

HCP Onboarding & Recipient Bulk Upload

Knowledge
Browse and search for articles

Most Read Articles
- As a Provider, how do I submit a question, issue or request for assistance related to CVMS?
- What should I do if a Provider or a Frontline Organization calls the Recipient Help Center?
- How can I get assistance with the COVID-19 Vaccine Management System (CVMS) Provider Portal?
- How do I update a recipient's information in CVMS (DOB, email address, date of admin, etc.)?
- How can I schedule a vaccine appointment for a recipient?

Featured Articles
No content to display

Most Useful Articles
- What is the COVID-19 Vaccine Management System (CVMS)?
- How do I register to administer the COVID-19 vaccine?
- As a Provider, how do I submit a question, issue or request for assistance related to CVMS?
- Can I vaccinate someone not registered in CVMS but is eligible for the current phase of vaccination?
- How do employees of an HCP get access to the CVMS Provider Portal to support vaccine management?

If you have any questions, issues or requests, please go to the CVMS Help Desk Portal[*] at **https://ncgov.servicenowservices.com/csm_vaccine**

You can also call the COVID-19 Vaccine Provider Help Center at **(877) 873-6247** and select option 1.

The COVID-19 Vaccine Provider Help Center is available during the following hours:
Monday to Friday: 7 am – 7 pm ET
Saturday & Sunday: 10 am – 6 pm ET

[*] On the home page of the CVMS Help Desk Portal, select Login at the top right-hand corner, then select the "**Vaccine Provider**" option to submit your question, issue, or request.

Providers that are first time users of the CVMS Help Desk Portal will have to follow the steps below:
1. Register for an account on the portal by clicking 'Register' in the top right-hand corner
2. Populate your first name, last name, and business e-mail
3. You will receive an e-mail with your username and temporary password to log into the portal
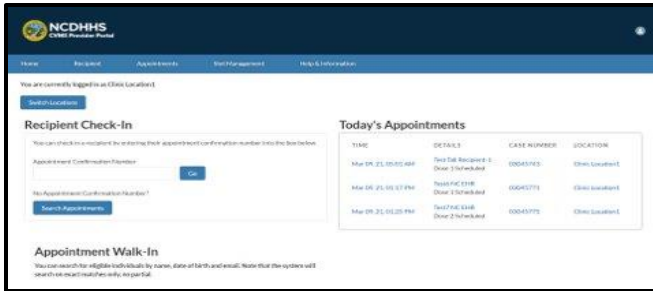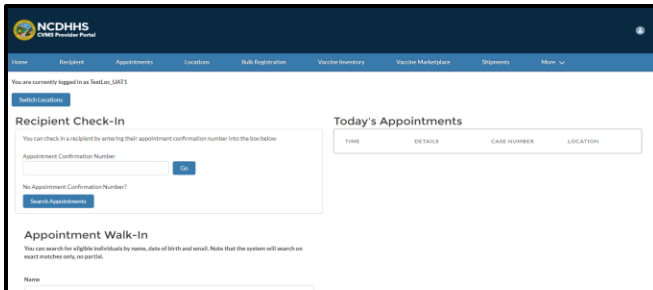
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NC DEPARTMENT OF
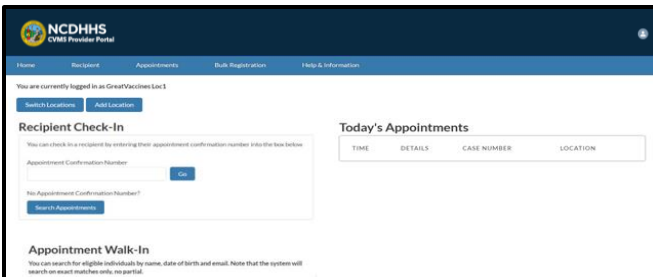HEALTH AND
HUMAN SERVICES

Overview

Overview

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

The CVMS Provider Portal allows Healthcare Providers in North Carolina to manage the administration of the COVID-19 vaccine. **The CVMS Provider Portal is different than the CVMS Provider Enrollment Portal, where Healthcare Providers enroll in the NC Vaccination Program and maintain their provider agreement.**

When logging in to the CVMS Provider Portal, be sure to have your **NCID USERNAME** and **NCID PASSWORD** available. *If you do not have an NCID username, refer to the Appendix for instructions on how to create one.*

The processes included in this training are for the **Healthcare Provider, Healthcare Location Manager, and Statewide Location Managers** profiles.

For **Statewide Location Managers,** all information for the Healthcare Provider profile will apply to the Statewide Location Manger profile. The '**Add A Healthcare Provider Location**' section is only for Statewide Location Managers.

Additionally, you will need to:
- Use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers
- Access the CVMS Provider Portal at https://covid-vaccine-provider-portal.ncdhhs.gov

Now, let's get started!

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Log in to the CVMS Provider Portal

Enter NCID Username and NCID Password

1. Navigate to https://covid-vaccine-provider-portal.ncdhhs.gov

2. Click on the **NCID** button

3. Enter your **NCID username** and **NCID password**

4. Click **NCID LOGIN**

5. You are logged in to the CVMS Provider Portal

For guidance on obtaining an NCID, refer to the Appendix of this User Guide.

Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

Tips

Your NCID username must be linked to your profile prior to your first log in. Contact your Healthcare Location Manager to request to be added to one or more locations set up in the CVMS Provider Portal.

Enter NCID Username and NCID Password

For users of the CVMS Provider Portal, there will be a confidentiality agreement that appears upon first/next log-in.

1. Read the statement

2. Click on **I AGREE**

Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

Confidentiality Agreement

CVMS is a system of the State of North Carolina, Department of Health and Human Services (NC DHHS), Division of Public Health (DPH) that enables vaccine management and essential data sharing between vaccine administrators, providers, and public health officials, who have authorized and credentialed access to CVMS (Authorized Users). CVMS contains immunization records and other Protected Health Information (PHI), Personally Identifiable Information (PII), and other information confidential under state and federal law (Confidential Information). At all times, CVMS shall only be accessed by Authorized Users consistent with that user's job duties, responsibilities, and level of authorization, exclusively for legally-permitted uses, and only to the extent strictly necessary (Authorized Access). By clicking "[I Agree]" and proceeding further, you are acknowledging you understand and agree with the preceding statements. Additionally, by clicking "[I Agree]" and proceeding further, you understand and agree to abide by all of the following, including the consequences of any violations of: applicable state and federal confidentiality laws; applicable provisions of the NC DHHS Office of Privacy and Security Manual; and applicable provisions of the North Carolina Department of Information Technology (NCDIT) Statewide Information Security Policies. Unauthorized access or use of CVMS or Confidential Information violates the CVMS Terms of Use and Confidentiality agreement and could expose you or your organization to civil or criminal liability.

Users of this system have no expectation of privacy. This system and equipment are subject to monitoring to ensure proper performance of applicable security features or procedures. Such monitoring may result in the acquisition, recording, and analysis of all data being communicated, transmitted, processed, or stored in this system by a user. If monitoring reveals possible evidence of criminal activity, such evidence may be provided to Law Enforcement Personnel. Anyone using this system expressly consents to such monitoring.

Cancel | I Agree

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View the CVMS Provider Portal Tabs

*In the CVMS Provider Portal, **TABS** help you navigate between pages. The **TABS** you see are based on your user profile, Healthcare Location Manager, Healthcare Provider, or Statewide Location Manager.*

1. Users with Healthcare Location Manager profile have the tabs shown below: **HOME, RECIPIENT, APPOINTMENTS, LOCATIONS, BULK REGISTRATION, VACCINE INVENTORY, VACCINE MARKETPLACE, SHIPMENTS, ORGANIZATION MANAGEMENT, ACCOUNT MANAGEMENT, REPORTS,** and **HELP & INFORMATION**
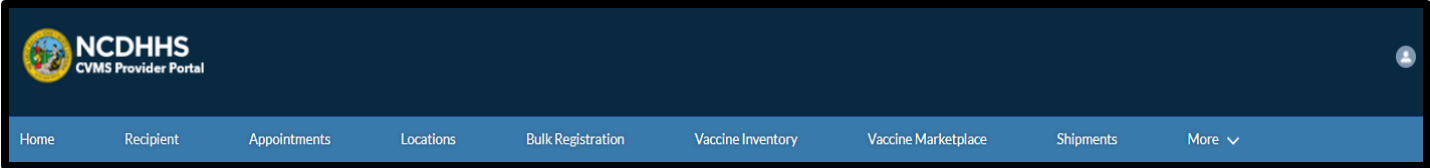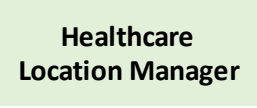

2. Users with Healthcare Provider profile have the tabs shown below: **HOME, RECIPIENT, APPOINTMENTS,** and **HELP & INFORMATION**

3. Users with Statewide Location Manager profile have the tabs shown below**: HOME, RECIPIENT, APPOINTMENTS, BULK REGISTRATION,** and **HELP & INFORMATION**

Audience

| Healthcare Provider |
| Healthcare Location Manager |
| Statewide Location Manager |

Tips

Learn more about managing your recipient's appointments in the **CVMS Provider Portal Recipient Check-In User Guide.**

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Multi-Location Users Only: Select Location Using 'Switch Location' Before Proceeding

Users associated with multiple locations will have to select a location where you are operating from upon logging in to the CVMS Provider Portal.

When you log in to the CVMS Provider Portal, **please pay attention to the banner at the top of the Home page.** All of your operations in the Portal (e.g., booking appointments, logging vaccine administration) will be attributed to the location that you select. You **will not** be able to complete these task until you pick a location.

1. Click **SWITCH LOCATION**

2. Select the **LOCATION** where you will operate during the day

Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

Tips

User associated with multiple locations will have to select a location they are operating from upon logging in to the CVMS Provider Portal.

If reconnecting after logging out, your location will have been erased and you will need to once again select the location where you are operating from.

Logging In to Another Location (if necessary)

At any time, you can switch to another location if you need to support another location by using the **SWITCH LOCATIONS** button.

1. Click on the **SWITCH LOCATIONS** button

2. Select the appropriate location from the list that appears and click **SUBMIT**

3. **Please always confirm that your location was switched to the location of your choice** by checking the location name displayed at the top of the **HOME** page

Audience

> Healthcare Provider

> Healthcare Location Manager

> Statewide Location Manager

Tips

Your NCID must be associated to multiple locations to use this functionality. If you are only associated to one location, you will not be able to switch to another location.

If you have a Statewide Location Manager profile, please read **Statewide Location Manager Profile: Add a Healthcare Provider Location** at the end of this User Guide.

Navigate the CVMS Provider Portal

Step 1 of 13: View the CVMS Provider Portal Homepage

On the left side of the Homepage, you see **APPOINTMENT WALK-IN**, and on the right-side **TODAY'S APPOINTMENTS**.

Please note that the Date of Birth will be displayed as follows: Year – Month – Day.

Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

Tips

If inactive for 2 hours, the session will expire, and you will have to sign back into the CVMS Provider Portal. **If you are timed out, you will need to start your current action over, as the system will not save where you left off.**

The **RECIPIENT** tab shows a list of recipients whose information is in CVMS Provider Portal.

Your search results will also include in the lower section any records of a recipient who received a COVID-19 vaccine dose from a Federal Long-Term Care Facility Program partner (e.g., CVMS, Walgreens) or from a Federal Retail Pharmacy partner (e.g., CVS, Walgreens).

Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

Tips

Learn more about managing your recipients in the **CVMS Provider Portal Recipient Point of Care User Guide** at https://covid19.ncdhhs.gov/vaccines/providers/covid-19-vaccine-management-system-cvms-steps-providers.

Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

The **APPOINTMENTS** tab shows a list of appointments in CVMS Provider Portal.

Click the Case Number to view appointment information. You can search appointments by Name, Location, Confirmation Code, Vaccine Status, or Date.

If your location has enabled the scheduling feature in CVMS, this is the tab where you will check-in recipients that scheduled an appointment, cancel an appointment, or schedule a second-dose appointment.

Tips

The appointments tab will default to show you appointments that are scheduled for the same day for the location you are logged in under.

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Audience

Healthcare Location Manager

Tips

Learn more about using the scheduling feature in CVMS to manage appointments in the **CVMS Provider Portal Managing Vaccine Site Locator at** https://covid19.ncdhhs.gov/how-add-edit-and-remove-your-location-vaccine-site-locator-website-user-guide/download **and Appointment Scheduling User Guide** at https://covid19.ncdhhs.gov/cvms-provider-portal-manage-appointment-scheduling-user-guide/download.

The **LOCATIONS** tab can be used to list your location's details on the Vaccine Site Locator website (https://vaccines.gov), and to share your scheduling website to recipients. You can also create additional locations to list on the Vaccine Site Locator website (e.g., a community vaccination event covered by your location). If your location elects to use the scheduling feature in CVMS**,** your location record links to the scheduling feature in CVMS so that recipients can use CVMS to book appointments at your location.

Note: This tab will only be available if you have the Healthcare Location Manager profile.

Audience

> **Healthcare Location Manager**

> **Statewide Location Manager**

The **BULK REGISTRATION** tab allows you to upload a list of recipients and generate their invitation to register in the COVID-19 Vaccine Portal to receive a COVID-19 vaccine.

Tips

Learn more about uploading your eligible employees or individuals to invite them to register for the COVID-19 vaccine in the **CVMS Provider Portal Recipient Bulk Upload User Guide** at https://covid19.ncdhhs.gov/cvms-provider-portal-recipient-bulk-upload-user-guide-1/download.

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The **VACCINE INVENTORY** tab is used to manage your COVID-19 vaccine inventory.

1. To pin a list view, click 📌 . The pinned list view will then load as the default list view.

2. Click the header for the field column you want to sort by. An arrow appears indicating how the list is sorted: from the column's first record ⬆ (alphanumerically) or its last ⬇ (Down Sort icon).

3. Type your query into the search bar and press Enter. Click in the bar to check which fields are searchable.

Note: This tab will only be available if you have the Healthcare Location Manager profile.

Audience

> **Healthcare Location Manager**

Tips

Learn more about managing your COVID-19 vaccine inventory in the **CVMS Provider Portal Receiving and Processing Vaccine Shipments User Guide** at https://covid19.ncdhhs.gov/receiving-and-processing-vaccine-shipments-user-guide/download and in the **CVMS Provider Portal Vaccine Inventory Deprecation, Transfer and Redistribution User Guide** at https://covid19.ncdhhs.gov/cvms-provider-portal-inventory-deprecation-transfer-and-redistribution-user-guide/download.
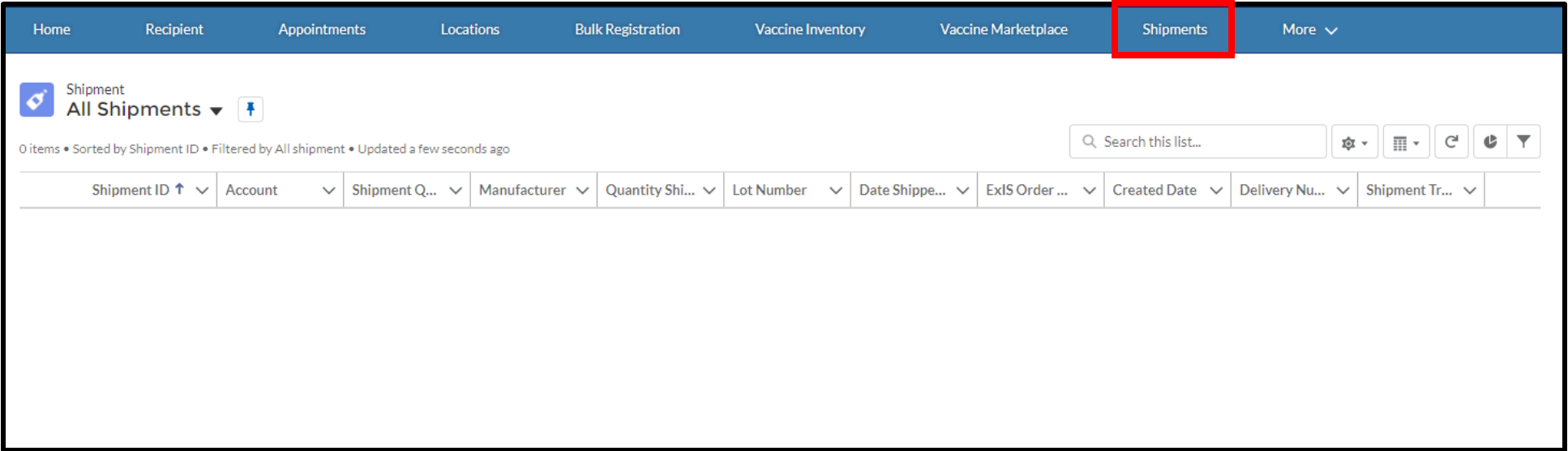
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HUMAN SERVICES

Audience

Healthcare Location Manager

1. The **VACCINE MARKETPLACE** tab allows Healthcare Location Managers to directly communicate and collaborate to arrange for the transfer of vaccine inventory from site to site

2. Healthcare Location Managers can seek matches, place wanted transfers, and place extra transfers.

Note: This tab will only be available you have the Healthcare Location Manager profile.

Step 8 of 13: Shipments Tab Overview

Audience

> Healthcare
> Location Manager

Tips

Learn more about administrating your COVID-19 vaccine inventory in the **CVMS Provider Portal Receiving & Processing Vaccine Inventory Shipments User Guide** at https://covid19.ncdhhs.gov/receiving-and-processing-vaccine-shipments-user-guide/download.

1. The **SHIPMENTS** tab allows you to see your location's COVID-19 vaccine shipment information

2. To pin a list view, click 📌. The pinned list view will then load as the default list view.

3. Click the header for the field column you want to sort by. An arrow appears indicating how the list is sorted: from the column's first record ⬆ (alphanumerically) or its last ⬇ (Down Sort icon).

4. Type your query into the search bar and press Enter. Click in the bar to check which fields are searchable.

Note: This tab will only be available you have the Healthcare Location Manager profile.

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Audience

Healthcare Location Manager

The **ORGANIZATION MANAGEMENT** tab allows you to invite essential workers' organizations to connect to CVMS. Once invited, these organizations can access the CVMS Organization Portal where they will be allowed to upload their list of eligible recipients. These recipients will then be able to register in the COVID-19 Vaccine Portal, saving time when they go to receive their first dose of the COVID-19 vaccine.

Tips

Learn more about Organization management in the **CVMS Provider Portal Organization Management User Guide** at https://covid19.ncdhhs.gov/media/2391/download.

Audience

Healthcare Location Manager

Statewide Location Manager

The **HELP & INFORMATION** tab allows you to see Frequently Asked Questions and General Information about the CVMS Provider Portal. You will also be able to access the PDF version of the COVID-19 Vaccine Registration Form.

Audience

Healthcare
Location Manager

Tips

Learn more about reporting in the **CVMS Provider Portal Reports User Guide** at https://covid19.ncdhhs.gov/cvms-provider-portal-reports-user-guide-2/download.

The **REPORTS** tab is used to access your COVID-19 vaccine reports. Click on **ALL REPORTS** to access the prepackaged reports available to you.

Note: This tab will only be available if you have the Healthcare Location Manager profile.

The **ACCOUNT MANAGEMENT** tab allows you to create user accounts. You can enter their NCID username

and expected role for the location you are logged in under.

Audience

Healthcare
Location Manager

Tips

Learn more about Account Management in the **CVMS Provider Portal User Account Management User Guide** at https://covid19.ncdhhs.gov/media/2368/download.

Audience

Healthcare Location Manager

Tips

Learn more about the Files tab in the **CVMS Provider Portal - Access Custom Reports in Files Tab Job Aid** at https://covid19.ncdhhs.gov/vaccines/providers/cvms-user-guides-recorded-trainings-and-upcoming-trainings.

The **FILES** tab allows certain Healthcare Location Managers to receive customized report files from the CVMS team.

Note: Most users will not have access to this feature.

Statewide Location Manager Profile:
Access Additional Locations

If you are a Statewide Location Manager, you can add new locations to the list of locations for you to select you are operating from by clicking the **ADD LOCATION** button.

1. Click on the **ADD LOCATION** button

Tips

Learn more about it in the Statewide Location Manager Profile - Switch Location Job Aid at https://covid19.ncdhhs.gov/cvms-statewide-location-manager-profile-switch-location-job-aid/download.

1. Search for the location name you wish to add (type the first 3 letters to display the list of locations that starts with that 3 letters)

2. Click on the name of the location you wish to add in the list of search results

3. Click **SUBMIT**

Audience

Statewide
Location Manager

Step 3 of 3: Switch to the newly added location

1. Click on the **SWITCH LOCATIONS** button

2. Select the newly added location you wish to login in as

3. Click **SUBMIT**

Audience

Statewide
Location Manager

Use the Vaccine Virtual Agent

Launching the Vaccine Virtual Agent

CVMS includes an automated virtual agent to help answer common questions about system use and functionality.

1. From the home screen, click on the **VIRTUAL AGENT ICON** to launch

Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

| Home | Recipient | Appointments | Locations | Bulk Registration | Vaccine Inventory | Vaccine Marketplace | Shipments | More ⌄ |

You are currently logged in as TestLoc_UAT1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

[   ] **Go**

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Jun 28, 21, 02:28 PM	ABCDEF ABCDEF Dose 1 Scheduled	09123266	TestLoc_UAT1

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Name

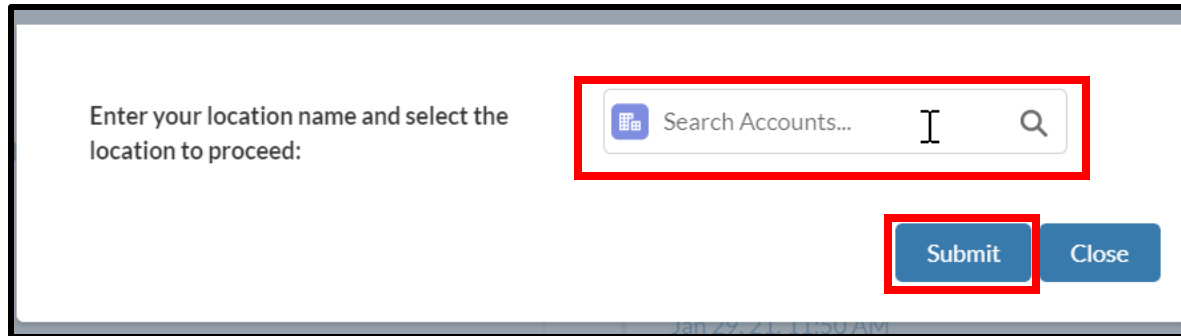[Search Name   ]

Date Of Birth

MM/DD/YYYY

[   ] 🗓

How may I help you? Click here >>

Vaccine Virtual Agent

The CVMS Virtual Agent launches in a new window.

1. Read the message, then click **I AGREE**

Audience

Healthcare Provider

Healthcare Location Manager

Statewide Location Manager

Vaccine Virtual Agent

We collect session information to personalize your experience, improve the quality of the virtual agent, provide new content and features over time, and analyze the traffic. It includes:

- Your interactions with the Virtual Agent (i.e., text of original questions entered and responses received, buttons clicked, session date and time)

When interacting with the virtual agent, you do not need to enter any personal information (i.e. your name, address, email address, login, password...).

By clicking "I agree", you consent to the collection and use of your information for analytical purposes and for services provided by the Department of Health and Human Services of the State of North Carolina.

I Agree

Vaccine Virtual Agent (continued)

2. Select your type of profile

3. Answer subsequent questions to find solutions to frequently encountered issues and questions

Audience

Healthcare Provider	

Healthcare Location Manager	

Statewide Location Manager	

Vaccine Virtual Agent

- Your interactions with the Virtual Agent (i.e., text of original questions entered and responses received, buttons clicked, session date and time)

When interacting with the virtual agent, you do not need to enter any personal information (i.e. your name, address, email address, login, password...).

By clicking "I agree", you consent to the collection and use of your information for analytical purposes and for services provided by the Department of Health and Human Services of the State of North Carolina.

I Agree

I Agree

Hi! I'm Sophia, the State of North Carolina's virtual agent for Covid-19 vaccines.

I am here to serve Healthcare Providers and Help Desk Representatives.

Before we start, are you a Healthcare Provider or a Help Desk Representatives?

Healthcare Provider

Help Desk Representative

Other

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Appendix

How to Obtain an NCID

Instructions for a user to create an NCID username:

1. Navigate to https://ncid.nc.gov/
2. Click **Register!** (in the bottom right corner of the blue box)
3. Click **Business** user type option
4. Complete the required fields to create an NCID
5. Follow the steps to access your NCID account **and** create your security questions
6. Once created, you will need to provide the exact first name, last name, email address, and NCID username that you used to create your Business NCID account to the designated Healthcare Location Manager for your location so they can request access to the CVMS Provider Portal for you.
7. Once access has been granted by NCDHHS, you will be sent an email to notify you that you are able to log in to the CVMS Provider Portal.

- If you have any questions **or need assistance in identifying the Healthcare Location Manager for your location**, please submit all inquiries to the CVMS Help Desk Portal at https://ncgov.servicenowservices.com/csm_vaccine.
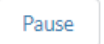
Additional Notes

Key Items:

- **Hyperlink**s appear as light blue and will provide additional information or navigation.

- *** Asterisks** are used to denote required information.

- A Toggle can be clicked to see selectable options.

- A Pen can be clicked to make edits to the field.

- Navigation Buttons can be clicked on to progress to the "next" or the "previous" step in a task.

- A Pause button can be clicked if you wish to step away / and return to your form later. You will be prompted to review your previously entered data upon your return/ login.

Supported Web Browsers:
- Please use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers to access CVMS.
- For more details on supported browsers, see **https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5**
- Note: Internet Explorer and Edge (non-Chromium) browsers are not supported.

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User Guide Change Log

Version	Date	Changes Made	Impacted Slides	Author
1	12/10/2020	• Uploaded the first version of the PPT	ALL	Training Team
2	1/10/2021	• Removed any mention of the 2 CVMS Help Desk emails • Added Service Now Portal information • Screenshot of new bulk upload added	1, 2, 17, 26, 27	Courtney Seward
3	1/15/2021	• Updated navigation bars for both CVMS Provider Profiles • Updated Recipient Tab search feature	12, 22	Azalea Troche
4	2/1/2021	• Updated the screen shots for Location manager to show reports tab on nav bar • Added Statewide Profile content • Added Reports tab content and Appointments tab content	9,12,17,18,19,20,21,22, 32	Kristin Clark; Tabitha McKelvy
5	2/12/2021	• Add Slides for Account Management and Organizational Management • Added session expired tip • Added multi locations slide • Updated screen shots of the expanded more tabs list	10-11, 24-27	Kristin Clark
6	3/11/2021	• Added Locations tab slide • Changed Scheduling tab to show Locations tab • Updated all nav bars for location manager • Updated screen shots to show Recipient Check In component	19, 20	Kristin Clark
7	4/15/2021	• Updated Recipient screenshot to include e-mail search and Vaccine Product Name • Updated Appointments screenshot to include Cancellation status • Added "confirmation code" to text to Appointments search • Updated Switch Locations screenshot to include current navigation bar	18, 19, 33	Darrell Lee
8	6/15/2021	• Added Confidentiality Agreement at first login slide • Added Vaccine Marketplace Overview • Added Files Tab Overview • Updated screenshots to reflect Vaccine Marketplace Tab	8, 23, 29, 5-29	Darrell Lee
9	6/28/2021	• Added chatbot/Vaccine Virtual Agent slides • Updated branding from MySpot.NC.gov to Vaccines.gov	12-15, 20	Darrell E. Lee

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